CMS Net

Display Eligibility Log

This guideline is for training and internal
use only.

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Preface

Legend   In procedures on the following pages, you will see various symbols used.

✔   When describing a procedure, the check mark indicates the result of an action.

➡   The arrow indicates a content note.

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Display Eligibility Log Screen

Overview

This document contains information about the CMS Net Display Eligibility Log.

These screens are reference screens and will be Display Only.

This screen displays historical (expired or closed) information. The information is a snapshot in time.

Users can view eligibility history for a client within a single-Program-Eligibility Date range. The Display Eligibility Log includes 11 screens from the Eligibility application.

Functions of these screens

These screens will allow the user to review:

- Review the historical residential status,

- Review the historical financial status,

- Review the historical enrollment and assessment fees and payment plans,

- Review the historical medical eligibility status,

- Review and track the interview and Medi-Cal application processes,

- Review the medical report request and received history,

- Review the historical program eligibility status,

- Review the Eligibility Tracking history,

- Review the Client Eligibility History, and

- Review the beneficiary card request history

Program Eligibility Date Range

The *most recent* program eligibility date range (open end-dated or expired) is always visible on both the current Program Eligibility screen and the Eligibility Log screen.

If or when a new program eligibility contract begins, the previous program eligibility range moves to history and is then accessible through the Display Eligibility Log screen.

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Display Eligibility Log Screen, Continued

Date Range Pick List

Once the Display Eligibility Log option is selected, a pick list displays with Program Eligibility Date Ranges (most current history at the top). Included is the option to view the following screens:

- Client Eligibility History screen

- Medical Report Request/Received History screen.

```
Select the historical period you would like to view:

(? )  Client Eligibility History
(  )  Medical Report Request/Received History
(  )  99/99/9999 to 99/99/9999
(  )  99/99/9999 to 99/99/9999
(  )  99/99/9999 to 99/99/9999
(  )  99/99/9999 to 99/99/9999
(  )  99/99/9999 to 99/99/9999
(  )  Quit
```

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Pick List Options

- Choosing the Client Eligibility History option brings up the Client Eligibility History screen.

- Choosing the Medical Report Request/Received History option brings up the Medical Report Request/Received History screen.

- Selecting a Program Eligibility Date Range from the picklist, brings up the Display Eligibility Log Screen for the chosen date range.

- Choosing 'Quit' from the Program Eligibility Date Range picklist returns the user to either the Primary Menu or the Eligibility Menu (conditional on the method of access).

Closed Status

A case can have a **closed** status on the Client Eligibility screen with a **current** open Program Eligibility Date Range.

Because the Pgrm End Date **did not expire**, the user can access this specific case information through the **current** Program Eligibility screens

Once that date *expires*, the system records this information.

Display Eligibility Log Screen, Continued

Steps to Access the Screen

When the Program Eligibility date range expires, the Display Eligibility Log screens provide the **only** access to patient historical data.

Step	Action
1	The user can select the Display Eligibility Log screen from either the Primary Menu or the Eligibility Menu. ➡ Once selected, a pick list displays with Program Eligibility Date Ranges (most current history at the top). Included is the option to view the Client Eligibility History screen and the Medical Report Request/Received History screen.
2	Select a date range or history screen from the Pick List.
3	Press <Enter>. ➡ The Display Eligibility Log screen displays.

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Display Eligibility Log Screen CMSLM-10

Use the <Down Arrow> keys to move from field to field.

```
CMSNET                    DISPLAY ELIGIBILITY LOG                    CMSLM-10
-------------------------------------------------------------------------------
Pt Nm: XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX  CCS#: 9999999  CIN: 99999999X 9
1) Gender: X  DOB: 99/99/9999  Lgl Co: XXXXXXXXXX  REG=XXXXXXXX    MED=X   F/R=X
-------------------------------------------------------------------------------
2) Pgrm Begin Date 99/99/9999 End 99/99/9999


3)                     ( )  Pending Eligibility History
4)                     ( )  Residential Worksheet History
5)                     ( )  Financial Worksheet History
6)                     ( )  Enrollment/Assessment Fees History
7)                     ( )  Medi-Cal Coverage History (not in use)
8)                     ( )  Insurance Coverage History (not in use)
9)                     ( )  Healthy Families Coverage History (not in use)
10)                    ( )  Medical Eligibility History
11)                    ( )  Program Eligibility History
12)                    ( )  Eligibility Tracking History
13)                    ( )  Replace Beneficiary ID Card History

14)                    ( )  Quit

```

Step	Action
1	Select one of the Eligibility History screens to view data. Press <Enter>.
2	If the user selects "Quit," the system refreshes the Program Eligibility Date Range Selection Pick List. User can make another selection.

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Display Eligibility Log Screen, Continued

Data Field Descriptions   The table below lists field numbers, names, and descriptions for this Display Only screen

Field #	Field Name	Description/Comments
1	(header)	**Display Only**
2	Pending Eligibility Begin and End Dates	**Display Only**
3	Pending Eligibility History	**Selection** Displays the Pending Eligibility screen history.
4	Residential Worksheet History	**Selection** Displays the Residential Worksheet screen history.
5	Financial Worksheet History	**Selection** Displays the Financial Worksheet screen history.
6	Enrollment/Assessment Fees History	**Selection** Displays the Enrollment/Assessment Fees screen history.
10	Medical Eligibility History	**Selection** Displays the Medical Eligibility screen history.
11	Program Eligibility History	**Selection** Displays the Program Eligibility screen history.
12	Eligibility Tracking History	**Selection** Displays the Eligibility Tracking screen history.
13	Replace Beneficiary ID Card History	**Selection** Displays the Replace Beneficiary ID Card screen history.
14	Quit	Returns to Eligibility Log Screen. User can select a new Program Eligibility Date Range

Exit the Screen   Exit this screen by using pressing <Enter>.

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Medical Report Request/Received

Medical Report Request/ Received CMSHMR-10 Screen

The Medical Report Request screen and the Medical Report Received screen have been combined for historical view. The user can view the overall report status on one screen. It is a Display Only screen.

From the Date Range Pick List, select Medical Report Request/Received History.

Sorting

This screen displays all Medical Report Requests and Reports Received within the selected Program Eligibility Date Range.

The reports are displayed in reverse chronological order, or most recent date first.

```
CMSNET                    MEDICAL REPORT REQUEST/RECEIVED              CMSHMR-10
--------------------------------------------------------------------------------
1)Pt Nm: XXXXXXXXX1XXXXXXXX2XXXXXXXX3XXXXXXXX4   CCS#: 9999999  CIN: 99999999X 9
Gender: X  DOB: 99/99/9999  Lgl Co: XXXXXXXX1  REG=XXXXXXX      MED=X     F/R=X
--------------------------------------------------------------------------------
2) Medical Report Request/Received Status:xxxxxxxxxxxxxxx
3) Reason Requested: xxxxxxxxxxxxxxxxxxxxxxx    4) Report Received Date: 99/99/9999
5)Provider Information:              6)Case Review In Months: xxxxxxxxxxxxxxx
a) Nm xxxxxxxxxxxxxxxxxxxxxxxxxxxxx
b) St1 xxxxxxxxxxxxxxxxxxxxxxxxxx
c) St2 xxxxxxxxxxxxxxxxxxxxxxxxxx
d) Cty xxxxxxxxxxxxxxxxxxxx
e) St xx      f) Zip 99999
Letter Cycle
7)Status:            8)Ltr Name:    9) Dt Printed: 10)Corresp #:    11) Nxt Ltr Due:
XXXXXXXXXXXXXX       xxxxx          99/99/9999     9999.99999       99/99/9999
XXXXXXXXXXXXXX       xxxxx          99/99/9999     9999.99999       99/99/9999

12) Req Cmnt: xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx
xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx
xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx

13) Rcv Cmnt: xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx
xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx
xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx
14)Last Update By: xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx  15) Date: 99/99/9999
```

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Medical Report Request/Received, Continued

Medical Report Request/Received Screen Field Descriptions

The table below lists field numbers, names, and descriptions for this Display Only screen

FLD#	ELEMENT NAME	DESCRIPTION/COMMENTS
1	(Header)	**Display Only** Common patient's header information
2	Medical Report Request/Received Status	**Display Only** Display most recent status for a specific report from either the Medical Report Request or Medical Report Received Screen.
3	Reason Requested	**Display Only** Display most recent reason requested from the Medical Report Request Screen.
4	Report Received Date	**Display Only** Display Report Received Date from the Medical Report Received Screen.
5a	Provider Information Nm	**Display Only** Display Provider Name Information from Medical Report Request Screen.
5b	Provider Information St1	**Display Only** Displays Provider St1 Information from the Medical Report Request Screen.
5c	Provider Information St2	**Display Only** Displays Provider St2 Information from the Medical Report Request Screen.
5d	Provider Information Cty	**Display Only** Displays Provider Cty Information from the Medical Report Request Screen.
5e	Provider Information St	**Display Only** Displays Provider St Information from the Medical Report Request Screen.
5f	Provider Information Zip	**Display Only** Displays Provider Zip Information from the Medical Report Request Screen.

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Medical Report Request/Received Screen Field Descriptions (continued)

FLD#	ELEMENT NAME	DESCRIPTION/COMMENTS
6	Case Review in Months	**Display Only** Displays the most recent Case Review in Months value from the Medical Report Received Screen.
7	Letter Cycle – Status	**Display Only** Displays Letter Cycle Status from Medical Report Request Screen.
8	Ltr Name	**Display Only** Displays the Ltr Name from the Medical Report Request Screen or blank.
9	Dt Printed	**Display Only** Displays Dt Printed from the Medical Report Request Screen or blank.
10	Corresp #	**Display Only** Displays the Corresp # from the Medical Report Request Screen or blank.
11	Next Ltr Due	**Display Only** Displays the Next Ltr Due from the Medical Report Request Screen or blank.
12	Req Comment	**Display Only** Displays the comments from the Medical Report Request Screen.
13	Rcv Comment	**Display Only** Displays the comments from the Medical Report Received Screen.
14	Last Update By	**Display Only** Displays the Last Update By field from the screen that was last updated, either the Medical Report Request or Received Screen.
15	Date	**Display Only** Displays the Date from the screen that was last updated, either the Medical Report Request or Received Screen.

Exit the Screen   Exit this screen by pressing <Enter>.

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Client Eligibility History Screen

Overview The Client Eligibility History screen includes only the historical portion of the Client Eligibility Screen. All fields are Display Only

Accessing the Client Eligibility Screen From the Date Range Pick List, select Client Eligibility History.

```
CMSNET                        CLIENT ELIGIBILITY                      CMSHCE-10
--------------------------------------------------------------------------------
Pt Nm: XXXXXXXX1XXXXXXXX2XXXXXXXX3XXXXXXXX4  CCS#: 9999999  CIN: 99999999X 9
1) Gender: X  DOB: 99/99/9999  Lgl Co: XXXXXXXX1  REG=XXXXXXX     MED=X    F/R=X
--------------------------------------------------------------------------------
2) PSA Begin Date 99/99/9999 End 99/99/9999  CCS Elig Status XXXXXXXXXXXXXXXXXXXX

3) Client Eligibility History

Co  S  T  CCS Elig Stat          Start Date  Cl/Den Dt   Reason Closed/Denied
99  x  x  xxxxxxxxxxxxxxxxxxxx   99/99/9999  99/99/9999  xxxxxxxxxxxxxxxxxxxxxxx

99  x  x  xxxxxxxxxxxxxxxxxxxx   99/99/9999  99/99/9999  xxxxxxxxxxxxxxxxxxxxxxx

99  x  x  xxxxxxxxxxxxxxxxxxxx   99/99/9999  99/99/9999  xxxxxxxxxxxxxxxxxxxxxxx

99  x  x  xxxxxxxxxxxxxxxxxxxx   99/99/9999  99/99/9999  xxxxxxxxxxxxxxxxxxxxxxx

99  x  x  xxxxxxxxxxxxxxxxxxxx   99/99/9999  99/99/9999  xxxxxxxxxxxxxxxxxxxxxxx

99  x  x  xxxxxxxxxxxxxxxxxxxx   99/99/9999  99/99/9999  xxxxxxxxxxxxxxxxxxxxxxx

99  x  x  xxxxxxxxxxxxxxxxxxxx   99/99/9999  99/99/9999  xxxxxxxxxxxxxxxxxxxxxxx
```

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Client Eligibility History Screen, Continued

Data Field Descriptions   The table below lists field numbers, names, and descriptions for this Display Only screen

FLD#	ELEMENT NAME	DESCRIPTION/COMMENTS
1	(Header)	**Display Only**
2	Co	**Display Only** County Code
	S	**Display Only** Case Status
	T	**Display Only** Case Type
Client Eligibility History		
	CCS Elig Status	**Display Only** CCS Elig Status
	Start Date	**Display Only** Start Date Displays value from "Elig Start Date"
	Cl/Den Dt	**Display Only** Closed/Denied Date
	Reason Closed/Denied	**Display Only**

Exit the Screen   Exit this screen by pressing <Enter>.

NOTES

This page intentionally left blank for User notes.

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